

TRAVELER SENTIMENT 2021

Central Europe

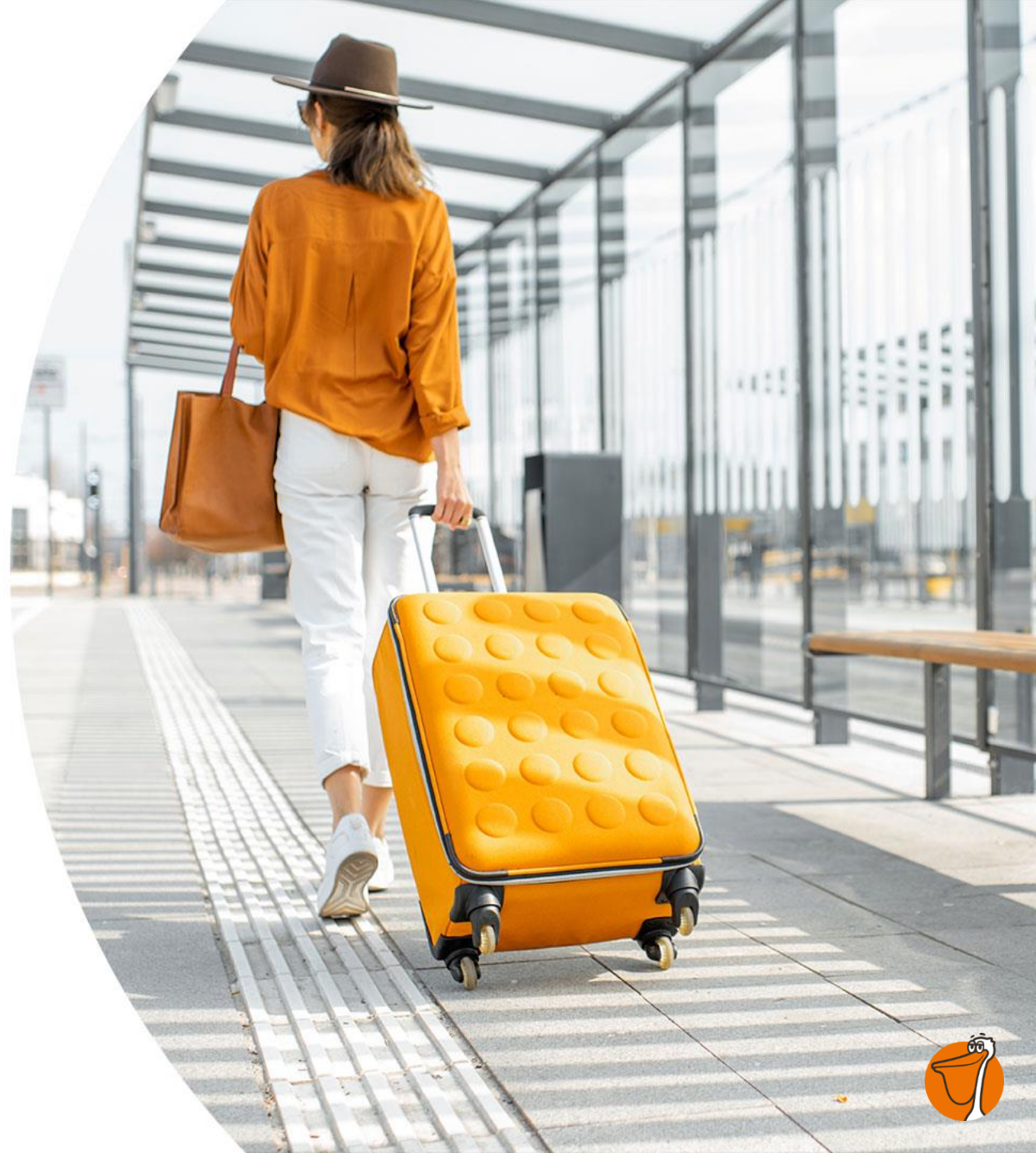


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TRAVEL PLANS FOR 2021

We surveyed over 6 000 travelers across 4 countries to understand the impact of the pandemic on 2021 travel plans and the factors that influence their destination, accommodation and booking decisions.

By combining survey data with real-time travel intent and demand data derived from Pelicantravel.com's booking websites, we are able to put together an exclusive insight into travel demand trends in Central Europe.



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IN THE CE REGION**



Online travel agency



Travel advertising platform



Online travel magazine



SURVEY: UNDERSTANDING TRAVELER SENTIMENT

Pelicantravel.com conducted a survey to understand how the pandemic has impacted the intentions of travelers in Central Europe.

The survey was conducted in April 2021 online and polled over **6 000 respondents from 4 countries**, including:

-  Slovakia (SK)
-  Czech Republic (CZ)
-  Hungary (HU)
-  Poland (PL)

AGE

10% 25 and below
34% 26-40
33% 41-55
23% 56 and above



GENDER

Female 64% Male 36%



LOOKING BACK

6 in 10

travelers had to cancel a planned
trip due to the covid-19 pandemic

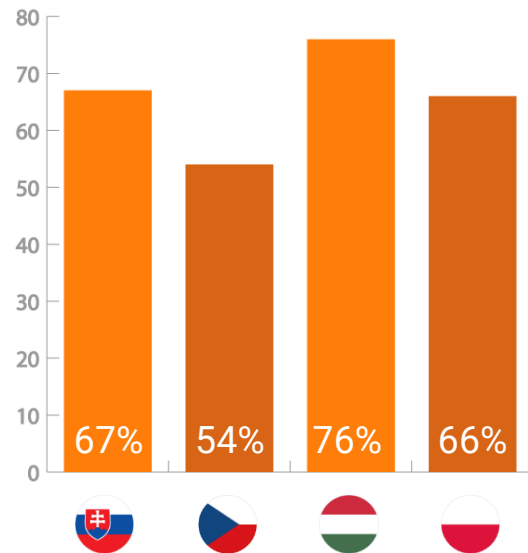


LAST AIR TRAVEL

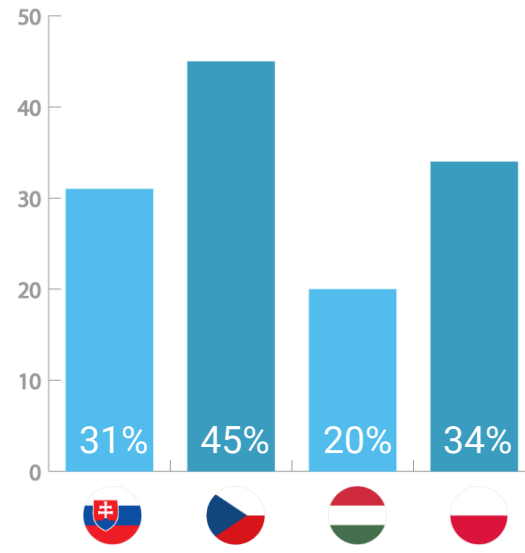
7 in 10

travelers have not travelled by plane since the pandemic started

BEFORE THE PANDEMIC



DURING THE PANDEMIC





LOOKING AHEAD

94%

travelers in Central Europe ARE
planning to travel in 2021



PURPOSE OF TRAVEL



82%

Leisure



10%

Visiting friends
or family



6%

I do not plan to
travel in 2021



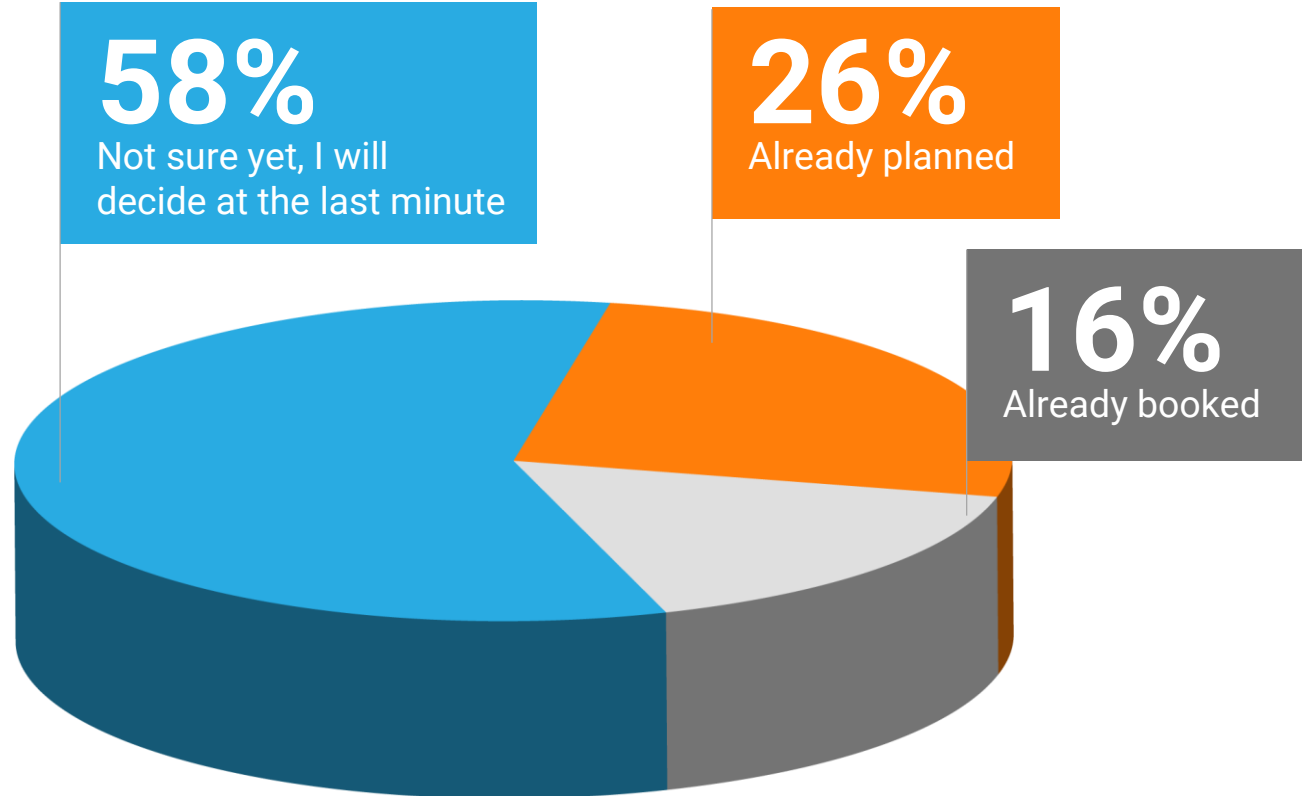
2%

Business



TRIP PLANNING STAGE

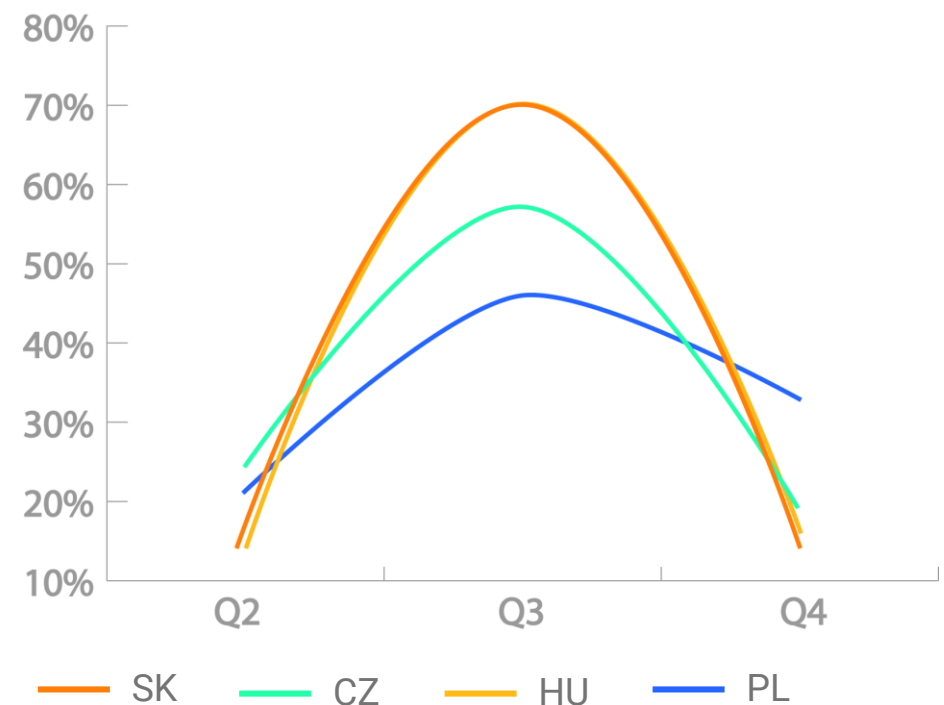
My 2021 trips are:



TRAVELERS ARE MORE LIKELY TO TAKE TRIPS FROM JULY TO SEPTEMBER 2021

When looking by country, there are interesting variances, again showing that Hungarian travelers are the most wary, while Czechs and Poles are the most eager to hit the road.

66% of travelers expressed their intent to travel between July and September.



TRANSPORTATION PREFERENCES

8 in 10



travelers plan to travel in 2021
by airplane



DESTINATION PREFERENCES

Which type of vacation will you be looking for in 2021?



62%

Beach



20%

City and sightseeing



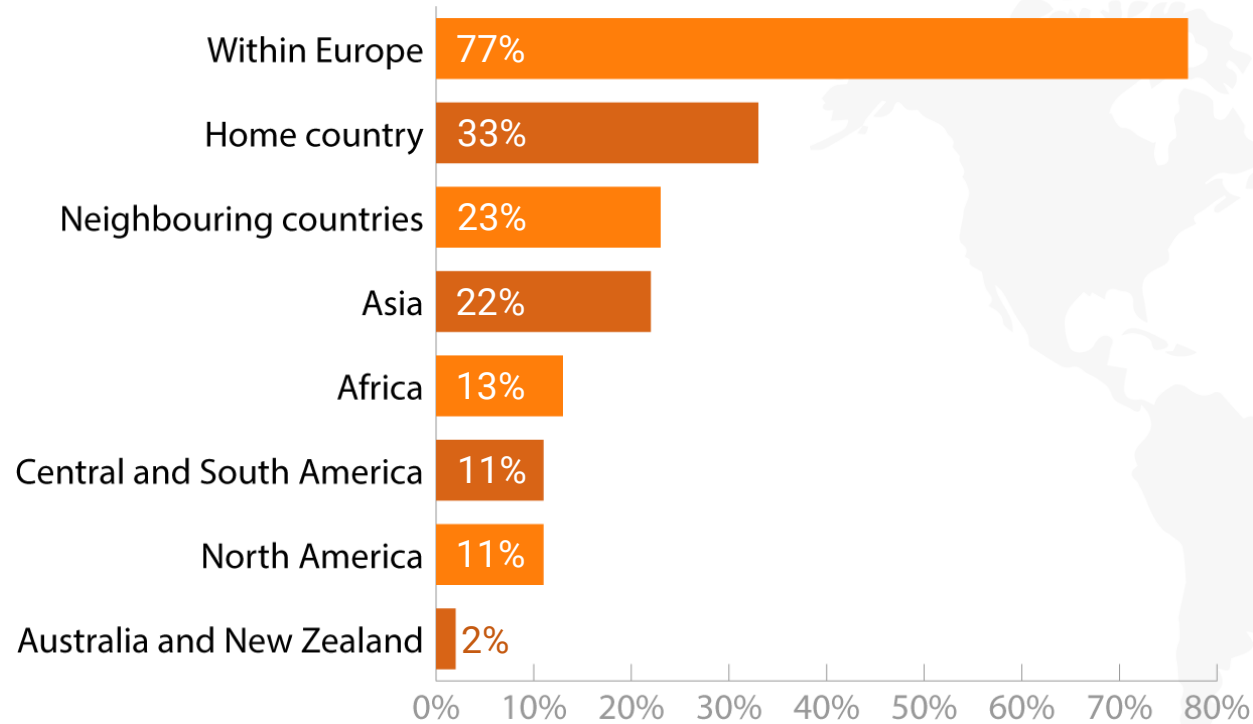
18%

Nature and mountains



DESTINATION PREFERENCES

Where do you plan to travel in 2021?
(multiple choice)



TOP 10 most popular:

Greece
Italy
Spain
Croatia
Egypt
Portugal
USA
Malta
Slovakia
Turkey





CONFIDENCE IN TRAVEL

6 in 10

travelers consider traveling to be **safe**

Only 1 in 10 travelers considers traveling not safe
and 3 in 10 consider it to be neutral.



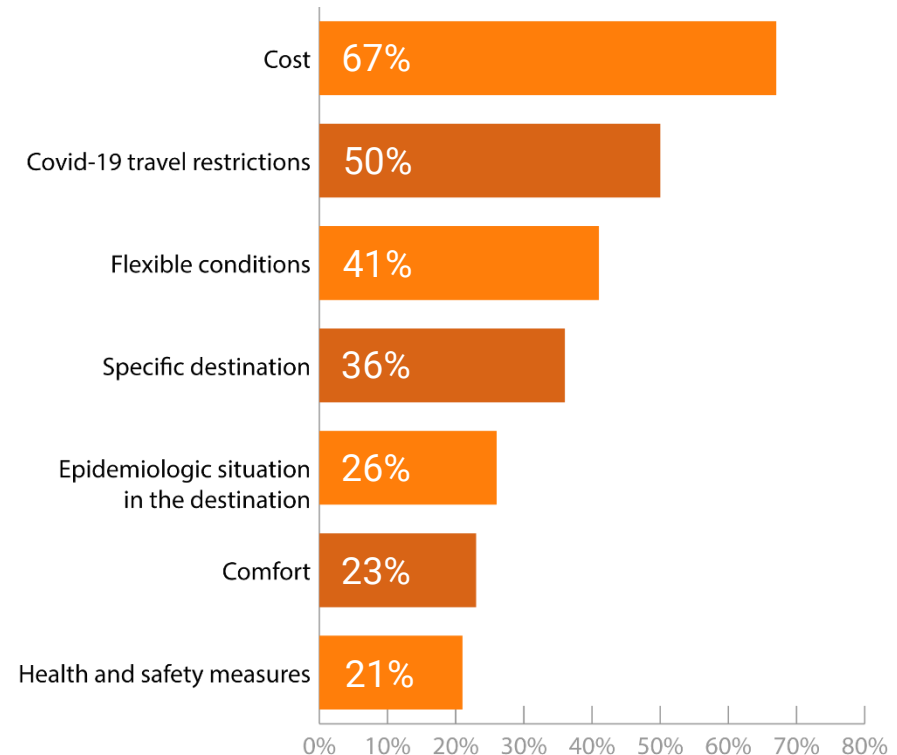
FACTORS THAT INFLUENCE TRAVEL DECISIONS

Price remains the most important deciding factor for 2 in 3 travelers.

Other leading deciding factors across markets were pandemic-related: **covid-19 travel restrictions** (entry, testing and quarantine rules) and **booking flexibility** (change and cancellation policies).

1 in 3 travelers have already chosen a specific destination for their travel.

While destinations and airlines put a lot of effort into promoting their health and safety measures, this turned out to be the least important deciding factor for travelers from CE.



TRAVEL INSURANCE

5 in 10

travelers plan to buy travel insurance

42%

Will decide at the last minute

20%

Will buy standard travel insurance

32%

Will select travel insurance that also covers unexpected covid-related situations

6%

Will not buy any insurance



BOOKING PROCESS

43%

Look for cheap flights, then book accommodation separately

28%

Look for both individual flights and package deals, then decide based on cost

19%

Look for package deals (flight + accommodation) from a travel agency

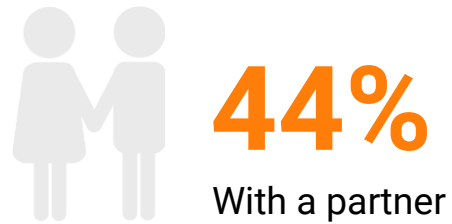
10%

Will not travel by plane, only book accommodation



TRAVEL COMPANIONS

In 2021, travelers will travel:



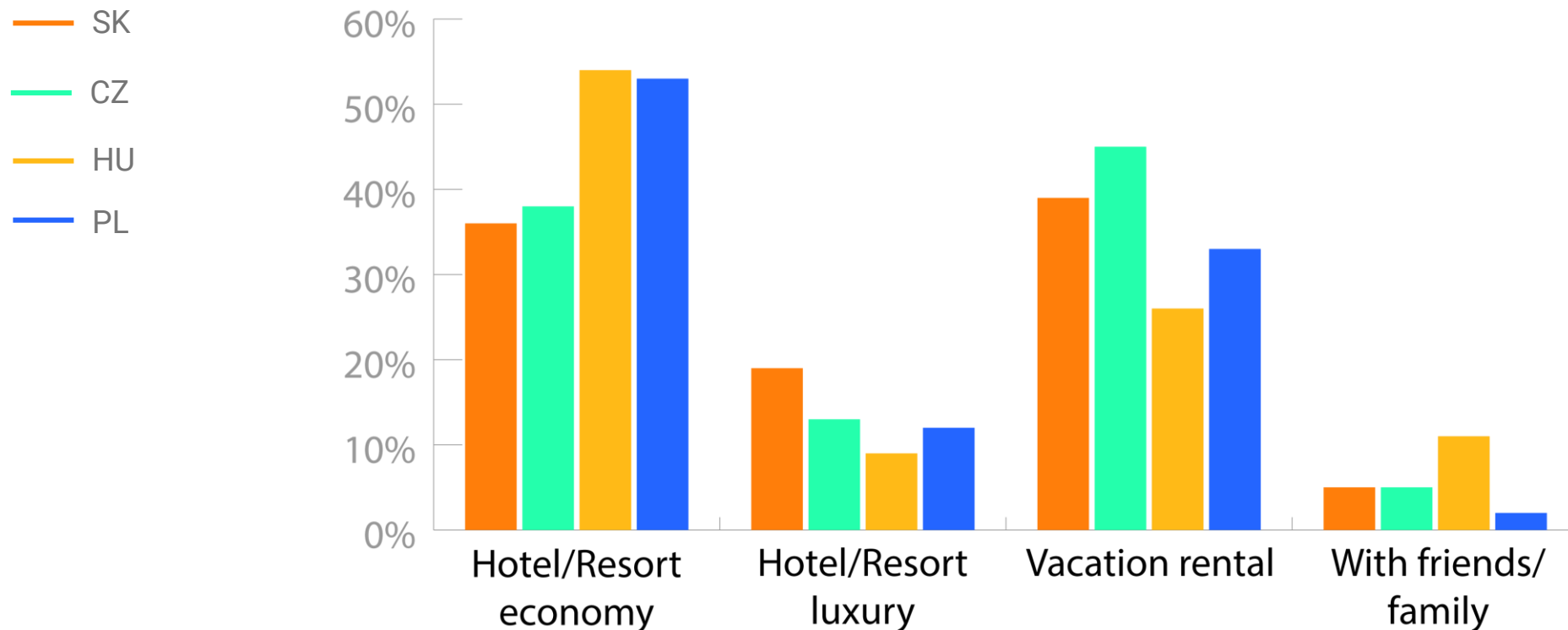
TRIP DURATION

6 in 10
travelers prefer to take **more trips that last shorter** rather than only one longer trip



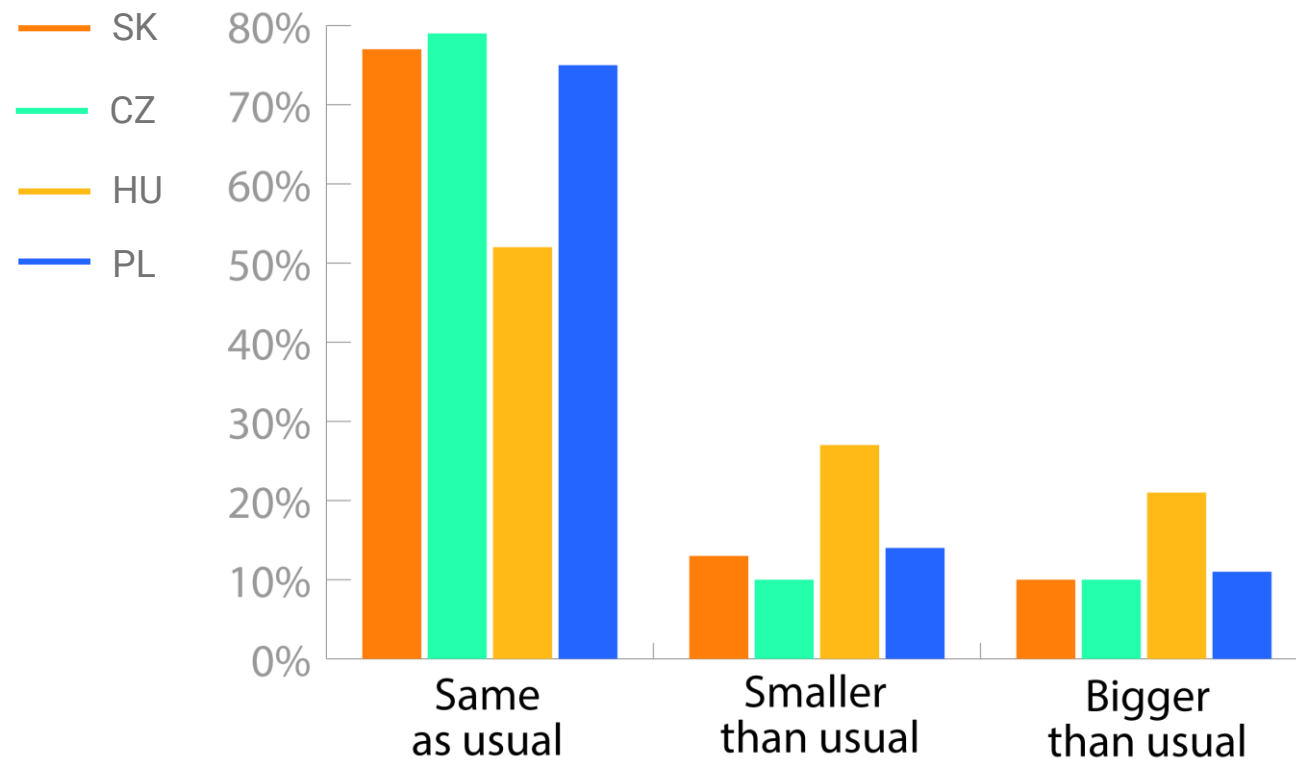
PREFERRED ACCOMMODATION

6 in 10 travelers prefer hotel accommodation,
while 3 in 10 prefer staying at vacation rentals.



TRAVEL BUDGET

7 in 10 travelers have the same budget for travel in 2021 as usual, despite the pandemic.



DESTINATION ENTRY REQUIREMENTS

6 in 10

travelers are comfortable with testing as an entry requirement

42%

Prefer testing requirement for all tourists arriving to their destination

40%

Prefer no testing or quarantine

14%

Entry requirements are not a deciding factor

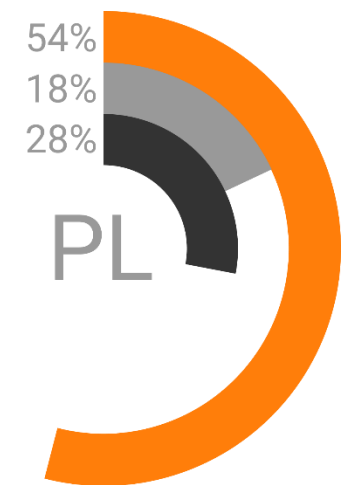
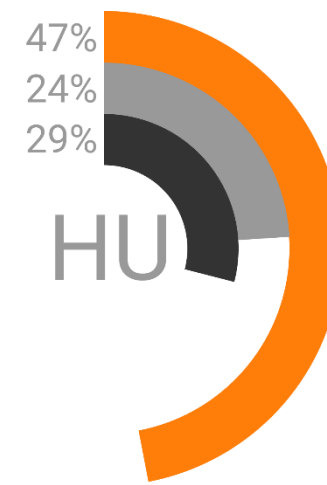
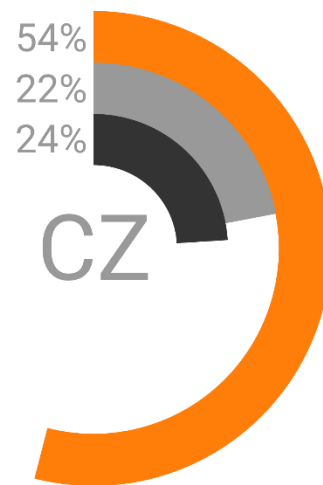
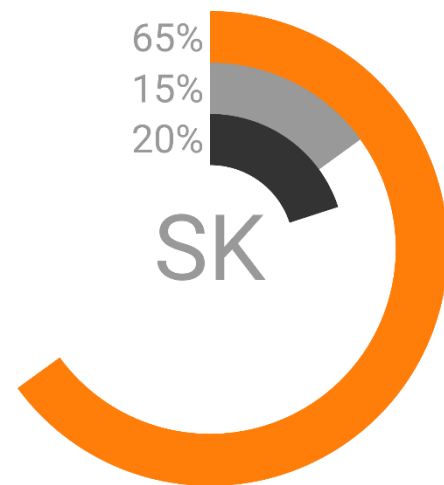
3%

Are comfortable with testing and quarantine



OPINIONS ON COVID CERTIFICATE

6 in 10 travelers consider the implementation of Covid certificates **POSITIVELY**



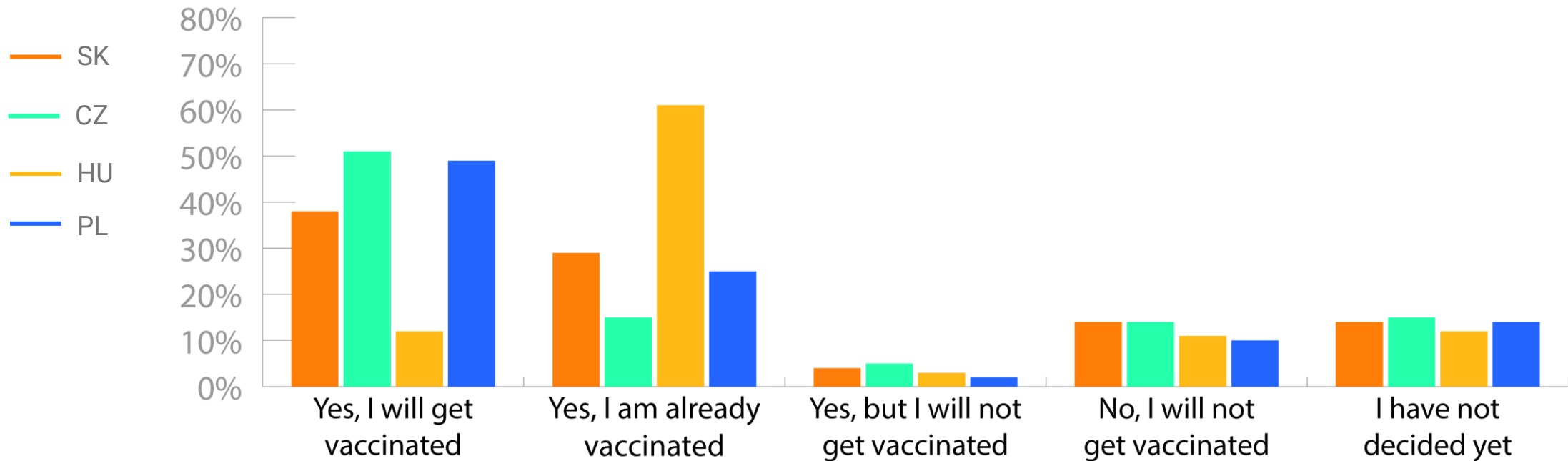
— positive — neutral — negative



OPINIONS ON VACCINATION AS A BENEFIT FOR TRAVELING

Do you consider vaccination as a benefit for traveling?

7 in 10 travelers consider vaccination beneficial in connection to traveling and will get or have already been vaccinated.



I DO NOT PLAN TO TRAVEL IN 2021 - FACTORS

Almost all stated reasons were pandemic-related: travelers are afraid of catching covid, being stuck in quarantine or of complications due to changing travel entry rules.

1 in 4 travelers stated mainly financial reasons.

Only 6% of respondents do not plan to travel in 2021.

47% Fear of contagion and health threat

43% Fear of quarantine abroad

40% Fear of border closures / tightened rules of entry

30% Fear of home quarantine after arrival

24% Financial reasons

18% I will not travel until vaccination

15% Other



THANK YOU
to all survey participants



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